

## **AGENDA**

Taxation, Probate & Trust Law Section  
Idaho State Bar  
June 10, 2008

1. Presentation by Judge Bieter
2. Call to Order: Meeting was called to order at the close of Judge Bieter's presentation at about 1230, at the Idaho State Bar Association offices
3. Approval of Minutes from April 8, 2008 meeting
4. Committee Reports & Assignments
  - a. **Legislative Committee (TEPI)**; Member- Robert Aldridge  
Review of uniform guardianship act, proposed changes and other legislation.
  - b. **Public Service Committee**: Member- Allen Bosch  
Nothing new reported, no committee members present.
  - c. **CLE Committee**: Members- Allen Bosch, Sharon Powers, Deb Cordes and Nick Marshall.  
David Turner reported having discussed various aspects of the upcoming Sun Valley CLE with Nicholas Marshall. Speakers to include Robert Aldridge, David Handler and Nancy McLaughlin.
  - d. **Newsletter Committee**: Member- Joe Kozlowski No update.
  - e. **Tax Liaison**: Member- John McGown  
Discussion of making a DVD (or other format) available of the recent IRS presentation and course materials. Further discussion whether to make the materials available to section members on request. Motion passed to make the materials available to section members on request.  
Further Motion to make materials available for a CLE passed.

The record is to show that Joe Uberuaga made the motion and voted in favor of an expenditure.

The Tax Liaison committee has a questions and issues meeting coming up to make presentations similar to the one given for the bar, to CPAs.

Questions and concerns will be shared with the IRS on the function and administration of the IRS.

- f. **Probate and Guardian Forms books:** Members- Joe Uberuaga, Jim Kaufman and Robert Aldridge  
Limited progress update, further update next meeting.

Professionalism & Ethics is working with the University of Idaho on a project to mentor law students. The possibility of donating funds, expanding the commitment to \$2000 was discussed.

5. Other Business:

- a. CLE presentation at ISB 2008 Annual Conference  
Bob Aldridge discussed the power of attorney conference in October.

6. Next Meeting: September 19, 2008